



Storyboard

Private Provider – Scanning RHET Packet and Other Documents

This storyboard demonstrates locations within TFACTS where you can Add a Document along with instructions of how to complete the task.

Table of Contents

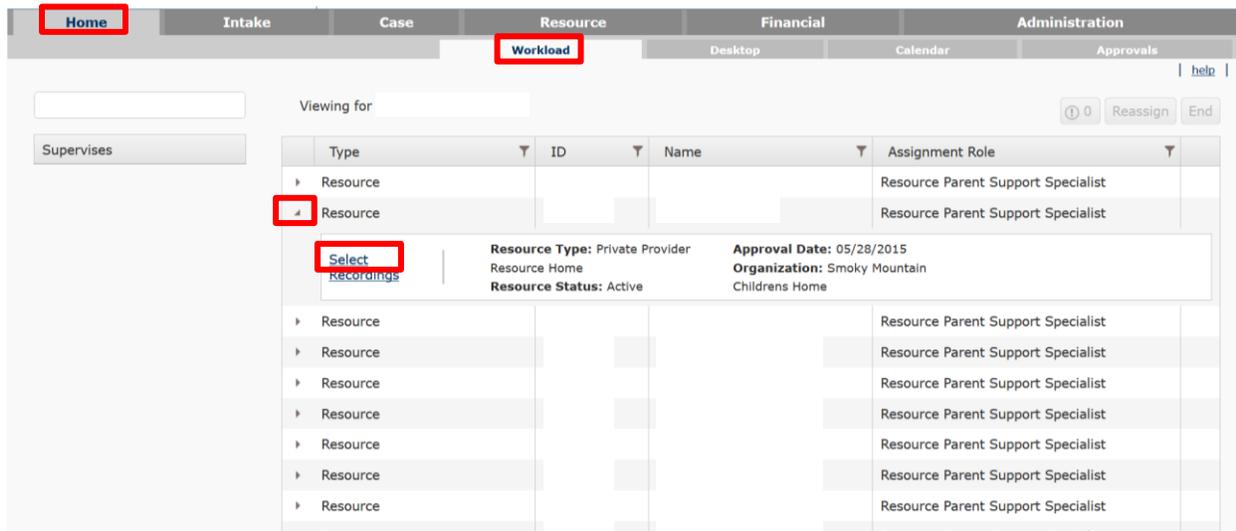
Adding a Document within the Resource Home	2
Accessing the Resource Home	2
Adding a Document from within the Resource Home.....	3
Resource Recording Screen	3
Document Screen (General items – Photos, Floor Plans, Training etc.).....	5
Home Study (RHET packets).....	7

Adding a Document within the Resource Home

Accessing the Resource Home

The **TFACTS Home** screen/**Workload** screen displays a listing of work items assigned.

- Click the **expando arrow** corresponding to the Resource Home.
- Click **Select**.



Continue to the next sub topic

Adding a Document from within the Resource Home Resource Recording Screen

- Click on **Resource Recording** in the blue navigation bar.

Resource Overview

Resource Name: Private Provider Resource Home
 Organization: Smoky Mountain Childrens Home
 Type: Private Provider Resource Home
 Sub-Type: Regular
 Resource ID: 314
 Status: Approved
 Primary Address: KNOXVILLE, TN
 Primary Contact: [Redacted]
 Approval Begin Date: 05/28/2015
 Approval End Date: 05/27/2017
 Approved Capacity: 1
 Gender: Both

Resource Actions
 Maintain Resource Information

Assignment Information

Organization	Employee Name	Supervisor Name	Assignment Role
Smoky Mountain Childrens Home	[Redacted]	[Redacted]	Resource Parent Support Specialist

Resource Alerts
 Alert Message

10 items per page
 No items to display

- Recordings will automatically display.
- Locate the recording that needs the document added.
- Click on **Document**

Recording Search Criteria

Activity From Date: [] Activity To Date: []

Recorded By: []

Status: Draft, Completed & System Completed

Activity Type: []

Sort Results By: []

Search Clear Form

Recording List

Add Recording Print

Result(s) 1 to 8 of 8 Page 1 of 1

	Activity Date	Status	Activity Type	Recorded By	Document
select	01/20/2014	Completed	Phone	[Redacted]	document
select	01/13/2014	Completed	DCS Office	[Redacted]	document
select	01/06/2014	Completed	Phone	[Redacted]	document
select	12/19/2013	Completed	Phone	[Redacted]	document
select	10/30/2013	Completed	Other Contact	[Redacted]	document
select	10/28/2013	Completed	Announced Visit	[Redacted]	document
select	09/30/2013	Completed	Phone	[Redacted]	document
select	09/26/2013	Completed	Announced Visit	[Redacted]	document

Add Recording Print

Continue

- Click **Add Documents**

Document

Work-Item ID : 278
Work-Item Reference : 1

Work-Item Type :
Task Type :
Provider Resource Recording

Document List

Document Type :
Sort By : Document ID (Ascending)

Display Clear Form

Document ID	Document Type	Document Name	Date on Document	Created By	Create Date
Add Documents Cancel					

- **Document Type*** using the dropdown, choose the most appropriate
- **Other Type** used if other is selected for **Document Type**
- **Document Name*** Be specific
- Click on **Browse** then locate the document to attach
- **Comments:** if appropriate but are optional
- **Date on Document:** if appropriate
- Click the **Save** button

Document > Document List

Work-Item ID : 278
Work-Item Reference :

Work-Item Type :
Task Type :
Provider Resource Recording

Document Properties

Created By :
Created Date :

Document Type :*
Document Name :*
Other Type :
Date on Document :

File to Attach : no file selected.

Comments :

Save Cancel

- Finished Product Sample below

Your data has been saved.

Document

Work-Item ID : 278
Work-Item Reference :

Work-Item Type :
Task Type :
Provider Resource Recording

Document List

Document Type :
Sort By : Document ID (Ascending)

Display Clear Form

Document ID	Document Type	Document Name	Date on Document	Created By	Create Date
<input type="button" value="select"/> 833824	Other	Phone Notes from 1/20/14 call		Hunt, Chris	04/19/2016 01:42 PM (CT)

Add Documents Cancel

Note: After uploading click on the Document ID number to view what was uploaded. If the wrong item was uploaded click **Delete** to remove the document.

Continue to the next sub topic

Document Screen (General items – Photos, Floor Plans, Training etc..)

From the Resource Home Overview Screen

- Click on **Document** in the blue navigation bar.

The screenshot shows the 'Resource Overview' screen. The left navigation bar has a blue background with several links. The 'Document' link is highlighted with a red rectangular box. The main content area displays the following information:

- Resource Overview:**
 - Resource Name: Private Provider Resource Home
 - Type: Private Provider Resource Home
 - Resource ID: 314
 - Primary Address: KNOXVILLE,
 - Organization: Smoky Mountain Childrens Home
 - Sub-Type: Regular
 - Status: Approved
 - Primary Contact:
 - Approval Begin Date: 05/28/2015
 - Approved Capacity: 1
 - Approval End Date: 05/27/2017
 - Gender: Both
- Resource Actions:**
 - Maintain Resource Information
- Assignment Information:**

Organization	Employee Name	Supervisor Name	Assignment Role
Smoky Mountain Childrens Home			Resource Parent Support Specialist
- Resource Alerts:**
 - Alert Message ▲
 - 10 items per page
 - No items to display

- Click **Add Documents**

The screenshot shows the 'Document' screen. At the top, it displays 'Work-Item ID : 278' and 'Work-Item Type : Provider Resource Overview'. Below this is a 'Document List' section with a 'Document Type' dropdown and a 'Sort By : Document ID (Ascending)' dropdown. There are 'Display' and 'Clear Form' buttons. At the bottom of the screen, the 'Add Documents' button is highlighted with a red rectangular box. The table below shows the columns for the document list:

Document ID	Document Type	Document Name	Date on Document	Created By	Create Date
-------------	---------------	---------------	------------------	------------	-------------

Continue

TFACTS Storyboard • Adding a Document Resource Home

- **Document Type*** using the dropdown, choose the most appropriate
- **Other Type** used if other is selected for **Document Type**
- **Document Name*** Be specific
- Click on **Browse** then locate the document to attach
- **Comments:** if appropriate but are optional
- **Date on Document:** if appropriate
- Click the **Save** button

Document > Document List

Work-Item ID : 278 Work-Item Type : Provider
Work-Item Reference : Task Type : Resource Overview

Document Properties

Created By :

Document Type : * Other Type :
Document Name : * Date on Document :

File to Attach : Browse... no file selected.

Comments :

Save Cancel

- Finished Product Sample below

Your data has been saved. close confirmation

Document

Work-Item ID : 278 Work-Item Type : Provider
Work-Item Reference : Task Type : Resource Overview

Document List

Document Type : Sort By : Document ID (Ascending)

Display Clear Form

	Document ID	Document Type	Document Name	Date on Document	Created By	Create Date	
select	833871	Digital Photos	Pix of home etc		Hunt, Chris	04/19/2016 01:49 PM (CT)	delete

Add Documents Cancel

Note: After uploading click on the Document ID number to view what was uploaded. If the wrong item was uploaded click **Delete** to remove the document.

Continue to the next sub topic

Home Study (RHET packets)

From the Resource Home Overview Screen

- Click on **Home Study** in the blue navigation bar.

Resource Overview

Resource Name: [Redacted] Organization: Smoky Mountain Childrens Home
 Type: Private Provider Resource Home Sub-Type: Regular
 Resource ID: 314 Status: Approved
 Primary Address: [Redacted] KNOXVILLE, TN Primary Contact: [Redacted]

Approval Begin Date: 05/28/2015 Approval End Date: 05/27/2017
 Approved Capacity: 1 Gender: Both

Resource Actions
[Maintain Resource Information](#)

Assignment Information

Organization	Employee Name	Supervisor Name	Assignment Role
Smoky Mountain Childrens Home			Resource Parent Support Specialist

Resource Alerts

Alert Message ▲

10 items per page No items to display

Close

- Click **Document**

Resource Header

Resource Name: [Redacted] ID: 278 Type: Private Provider Resource Home Sub-Type: Regular

Maintain Home Study History

Home Study Type	Begin Date	Disposition	Approval Date	Approval End Date	Organization	
select report Initial	04/01/2014	Approved	04/01/2014	03/31/2016	Smoky Mountain Childrens Home	document

[Add Home Study](#) [Add Addendum](#)

- Click **Add Documents**

Document List

Work-Item ID : 278 Work-Item Type : Provider Home Study
 Work-Item Reference : [Redacted] Task Type :

Document Type : [Dropdown] Sort By : Document ID (Ascending)

[Display](#) [Clear Form](#)

Document ID	Document Type	Document Name	Date on Document	Created By	Create Date
-------------	---------------	---------------	------------------	------------	-------------

[Add Documents](#) [Cancel](#)

Continue

TFACTS Storyboard • Adding a Document Resource Home

- **Document Type*** using the dropdown, choose the most appropriate
- **Other Type** used if other is selected for **Document Type**
- **Document Name*** Be specific (Reassessment LName, FName MM.DD.YY)
- Click on **Browse** then locate the document to attach
- **Comments:** if appropriate but are optional
- **Date on Document:** if appropriate
- Click the **Save** button

Document > Document List | help |

Work-Item ID : 27878346 Work-Item Type : Provider
 Work-Item Reference : Brown,Michael Shane Task Type : Home Study

Document Properties

Created By : _____ Created Date : _____
 Document Type : * _____ Other Type : _____

Document Name : _____ Date on Document : _____

Comments : _____

- Example Finished Product Sample below

Document | help |

Work-Item ID : 278 Work-Item Type : Provider
 Work-Item Reference : _____ Task Type : Home Study

Document List

Document Type : _____ Sort By : Document ID (Ascending)

	Document ID	Document Type	Document Name	Date on Document	Created By	Create Date	
select	282415	RHET Packet	initial 1 of 2			04/01/2014 02:33 PM (CT)	delete
select	282412	RHET Packet	initial 2 of 2			04/01/2014 02:34 PM (CT)	delete
select	282658	RHET Packet	waiver			04/02/2014 08:47 AM (CT)	delete

You have completed this storyboard!